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ABSTRACT

This speech draws a distinction between a priori and a posteriori planning, and relates these two types of planning in coping with the various problems faced by local school districts. The author describes the comprehensive planning process, the development of information required by the process, and how this process is supported in the local school district. (Author)

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PLANNING FOR CHANGE:

COMPREHENSIVE PLANNING*

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ABSTRACT

DISCUSSION PANEL ENTITLED "ORGANIZING, PLANNING, AND MANAGING THE LOCAL SCHOOL DISTRICT

The first presentation, "Planning for Change: Comprehensive Planning" draws a distinction between *a priori* and *a posteriori* planning, and relates these two types of planning in coping with the various problems faced by local school districts. It is also concerned with a description of the comprehensive planning process, the development of information required by the process, and how this process is supported in the local school district.

The second presentation "Project Management in a Local School District" is concerned with critical factors required to implement project management capability in a school district. It includes a slide tape presentation which defines the concepts of project and project management, and examines the advantages and limitations of project management, as well as the uses of project management in a public relations function.

The third and final presentation "Organizing for Change in Local School District" emphasizes the kinds of information needed to support organizational modification in a local school district. An important consideration is the premise that major change in school districts must be supported by an organizational structure which facilitates communication flows and human interactions necessary to implement change.

PLANNING FOR CHANGE: COMPREHENSIVE PLANNING

We can estimate when mankind first began to plan. Back towards the end of the Old Stone Age people first began to look about for appropriate stones and fashion them into crude tools. Before that, when there was need for a tool, a man simply picked up whatever piece of stone came to hand and tried to use it. If that stone didn't work out, well then he picked up another, and so on until something did the job. But at the point when man began to look about for stones to make into tools for later use, planning began, and so did the Middle Stone Age.

All planning is done with respect to a problem or a set of problems sometimes in response to the problem, other times in the hopes of identifying the problem before it reaches unmanageable levels. The nature of the problem has a lot to say about the type of planning that will have to be done to reduce its effects. And the type of planning that needs to be done has a lot to say about the kind of planning model that will best guide the planning process. Fortunately, as far as models are concerned, there are only two major families of problems. Let's call them Type 1 and Type 2.

We can call Type 1 problems <u>a priori</u> problems. They are related to plans that seek to start something up. If you must design and start up a school system in an area in which no school system has

ever existed, then you need to do a priori planning. If you want to design and build an employer based career education program, you need a priori planning. If you want to design and build a new middle school building you need an a priori plan.

But if you want to work on what is already there, or if your job is to improve it, then you need a different type of plan. You need a Type 2 plan, an a posteriori plan.

Let us leave Type 1 planning for the next presentation this afternoon and concentrate on Type 2 plans -- plans for the improvement of ongoing school district programs. At Research for Better Schools we are developing a Comprehensive Planning capability for use in local school districts. I would like to talk for a while about the kinds of information this produces and then offer some ideas about how it can be implemented.

We have heard a lot about Programming-Planning-Budgeting Systems or PPBS which were initially designed and implemented as a Type 1 planning tool. Even when PPBS was first introduced and applied to school districts it was viewed and implemented as a Type 1 tool. Fortunately, PPBS applications have taken a real turn for the better and are much closer to what we are calling Comprehensive Planning. I mention this improvement in how PPBS is being implemented for two significant reasons. First the imple-

mentation process is better because they are involving teachers and principals and secondly because the results are better -- that is, something is really being implemented.

According to a September 1971 Gallup Survey report, that included interviews from 1,500 respondents nationally, finance was cited most often as the biggest problem with which local school districts must deal. In other words, the districts are being challenged to get their schools running effectively and efficiently with an insufficient amount of money as perceived by the public. Besides rising costs and an increasing demand for the educational dollar, other pressures from teachers, pupils, community groups and politicians all contribute to a bad situation.

The Comprehensive Planning approach contends that these pressures cannot be responded to simply by reformatting line item budgets to give an impression that programs and performance are the essence of the district's managerial style. Often PPBS does little more than provide that impression.

Comprehensive Planning is a tool which helps district administrators and staff think about the district as a system. What do we mean by this? We mean that a district encompasses a number of more or less mutually-dependent activities, all of which are directed towards fulfilling parts of some over-riding district-

wide goals. It is within this context that your job as an executive takes place. Within this context you must assure smooth operation, means and procedures for anticipating and solving problems as they arise as well as assuring that the sum total of all these activities is in fact that the over-riding goals are attained.

First, I would like to talk about how some of our approach operates and then talk about how it can be implemented. Comprehensive planning activities are divided into two distinct phases -- an assessment phase and a program plan phase. In the assessment phase techniques are basically employed to define and refine district-wide objectives, to develop performance indicators and to apply these performance measures in classrooms. Assessments are made by staff including teachers, principals and central office administrators about the effectiveness of present district programs. The key assumption is that you must know where you are before you can decide where to go (and thus what to change). Essentially, then, the assessment activities are concerned with how effective your district is now.

The program plan stage builds on the assessment information and gives staff an opportunity to identify strengths and weaknesses, again with respect to those objectives that were identified and

to recommend changes. Of course, estimations about effectiveness and cost considerations are vital to the examination of these recommendations. The upshot of the program plan stage is a plan for change from each school building and an overall district program plan and budget.

Let's run through a scenerio about the way comprehensive planning would be implemented.

Before a school district undertakes to implement the comprehensive planning process, preparatory activities are initiated which involve examining and reorienting the existing organizational arrangements to facilitate the process. This activity -- Organizing for Change -- will be presented by Dr. Tarino.

The comprehensive planning process starts with a set of district-wide objectives developed by a planning group. The planning group consists of teachers (primarily), principals, perhaps a central office administrator and is generally directed by a curriculum specialist. One curriculum area per planning group is a good rule. District-wide objectives are derived from pupil need assessment data (incidentally, we are working on a package that deals with this), community information, district program descriptions, statements of policy and the like. It is possible to enlist community assistance in assigning priorities to these

objectives. In fact, this could be a very meaningful community participation role if these priorities were handled at the school building level.

Performance indicators are applied to the classroom by all teachers who elect to participate. The information each teacher receives from pre and post indicator administrations reflect strengths and weaknesses in the pupil-curriculum-teacher package as it relates to each of the district-wide objectives. Individual classroom information is returned only to the individual teacher.

Teachers analyze their results and submit recommendations for change to someone we call the planning coordinator. Planning coordinators are also teachers in the same building but these people have a differentiated role in planning. Planning coordinators assess the recommendations submitted by the teachers and in turn submit and discuss their recommendations with the principal. By assessing information and recommendations supplied by his teachers, the principal prepares a "plan for change." This plan includes supporting information on pupil performance and estimated expenditures when new cost factors are introduced as a result of the proposed changes.

At the central office, staff review building plans and try to

coordinate these plans across buildings and curriculum areas. Central office staff thus need to be more conversant in newer technologies and developments as well as be more knowledgeable.

Finally a district program plan is prepared and of course accompanied by a budget. This document describes not only ongoing and new programs and changes but their intended impacts upon the the district-wide objectives.

Among the topics Dr. Cummings will discuss will be some of the techniques that help to implement the changes identified by what we call comprehensive planning.